



REQUEST FOR PROPOSAL

Funding/Award Title:	State of Virginia Web-Based Homeowner Engagement Tool
Project Title:	BetterBuildings – U.S. State Energy Program: Multi-State Residential Retrofit Project
Submission Due Date:	Wednesday, November 2, 2011; 2pm EDT
Bidder's Webinar Date (optional):	Thursday, October 20, 2011; 2pm EDT
Expected Period of Performance:	December 1, 2011 – September 29, 2013

CONFIDENTIALITY ACKNOWLEDGEMENT

All information presented in this RFP is confidential. The recipient set forth on the cover page hereto agrees to maintain all information presented in confidence, to not to reproduce this RFP, and to disclose the information contained in this RFP only on a need-to-know basis to the recipient's employees, and then only to the extent necessary for such employees' evaluation of its contents and response to this RFP. This document should in no way be interpreted as a contract (implicit, explicit, or implied) between the Southeast Energy Efficiency Alliance and any person or entity.

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1 OVERVIEW

The Southeast Energy Efficiency Alliance (SEEA) is a 501(c)(3) nonprofit with the mission of promoting and achieving energy efficiency through networking, program activities, and education. The results of increased energy efficiency will be a cleaner environment, a more prosperous economy, and a higher quality of life in the southeastern United States. SEEA is based in Atlanta, GA, and is active in the 11-state region of Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, and Virginia. SEEA has developed close partnerships with existing energy organizations and businesses in the Southeast, including investor-owned and public utilities, wholesalers, retailers, state governors and energy offices, state public utility commissions, environmental and energy nonprofit organizations, energy service companies, manufacturers, universities, consumer groups, low-income advocates, and residential, commercial, industrial, and agricultural consumers.

In 2010, the U.S. Department of Energy (DOE) announced \$28.5 million in awards to 12 states and territories through the competitive stream of DOE's State Energy Program (SEP) to help create a sustainable transformation in the market for energy-saving, whole-building improvement in residential and commercial buildings. The State of Alabama and State of Virginia is part of a four-state partnership, which includes Massachusetts and Washington, that draws upon national experts to implement energy modeling and benchmarking, consumer outreach, contractor management, policy development and innovative financing for residential markets.

SEEA serves in a programmatic role to ensure that all efforts of this project are on task in both Virginia and Alabama. SEEA assists the State Energy Offices and oversees a comprehensive approach to energy efficiency improvements in single family homes through Regional Energy Alliance program implementers (REA's) aimed to achieve local market penetration rates of 2% or greater by the end of the grant period. This approach focuses on developing the capacity of these community-based, public-private partnerships to pilot home energy labels delivered through audits, provide an innovative suite of financing options, facilitate retrofit adoption by homeowners, engage auditors and contractors through training and workforce development, measure and verify results, and work with policy makers to support and ultimately grow the energy efficiency industry.

A key component of this project is establishing use of an online tool that will engage homeowners in the retrofit process. The purpose of this RFP is to provide the Southeast Energy Efficiency Alliance (SEEA) with an estimate for the work required to **create and rapidly implement** a web-based engagement tool (WET), which engages homeowners and converts them from leads to participants in the retrofit process by connecting them with Regional Energy Alliances who are subgrantees to the Virginia energy offices.

1.2 PARTNERS AND THEIR ROLES

This project is led by the state energy offices, with national coordination facilitated by the National Association of State Energy Officials (NASEO). Project partners include Advanced Energy, Earth Advantage Institute, Environment Northeast, Energy Programs Consortium, Southeast Energy Efficiency Alliance, Regional Energy Alliances, and other organizations.

- Southeast Energy Efficiency Alliance (SEEA) serves in a programmatic role to ensure that all efforts of this project are on task in both Virginia and Alabama. SEEA will assist the Energy Offices and oversee a comprehensive approach to deep energy efficiency improvements in single family homes through Regional Energy Alliance program implementers (REA's).
- Environment Northeast (ENE) will write a white paper during the planning/strategy phase that details the policy strategies that either exist or can be deployed by the various local and state governments involved in the project; provide technical expertise for energy efficiency policy at the local and state levels; assist in development of a detailed market characterization and action plan for each state.
- Energy Programs Consortium (EPC) will provide assistance during the planning/strategy phase with the development of streamlined residential energy efficiency programs that build on and incorporate financing options using all available federal, state, and other subsidies for increasing the affordability of retrofit models in order to provide the widest range of financing options.

- Earth Advantage Institute (EAI) will provide online audit tools for generating EPS scores, quality control for EPS energy modeling, an online interactive portal that streamlines the retrofit experience for homeowners, training curriculum and initial delivery of EPS auditor training, curriculum integration and initial delivery of Realtor and Appraiser trainings; and curriculum and train the trainer services in each state for a public outreach class on energy labeling for the duration of the project.
- Advanced Energy will utilize a train the trainer model to provide instruction for contractor development by regional trainers based on DOE Workforce Guidelines, training manuals and job aids, evaluate the training for continuous improvement, and develop processes and materials for certifications.
- Regional Energy Alliances are independent nonprofit organizations located in Virginia. In Virginia, there are three: the Southwest Regional Energy Alliance (Cafe²) located in Christiansburg and servicing Blacksburg/Roanoke area for this project, the Richmond Regional Energy Alliance (RREA) located in Richmond, and the Local Energy Alliance Program (LEAP) responsible for programs in Central and Northern Virginia. The online engagement tool should funnel customers to these entities' programs in order to help them meet their grant performance requirement of a 2% market penetration by 2013.

Realtor/Appraiser Outreach Realtor and appraiser training will be performed by Earth Advantage Institute to ensure that energy efficiency is properly valued when appraising and selling homes. EAI will provide its highly successful two-day Sustainability Training for Accredited Real Estate Professionals (S.T.A.R) program. S.T.A.R. educates real estate professionals about the features and benefits of new and existing green homes, the advantages of energy efficiency, EPS, and how to explain green features to their clients. Appraisers will be trained in the Residential Green Appraiser Series that is designed to develop residential appraisers' knowledge of EPS and high performance buildings; provide the most recent cost and value data available; and enable participants to complete an informed appraisal of a green home.

EPS Auditor Training The EPS Auditor training requires Building Performance Institute (BPI) Building Analyst or equivalent national certification as a pre-requisite. The training reviews building science basics, trains auditors on the data collection needed, use of the online tool, and best practices for making recommendations. In addition to traditional, cost-effective home upgrades, the EPS Scorecard includes optional deep energy retrofit improvements presented as an educational experience for homeowners and auditors alike. This part of the tool provides added value by exposing homeowners to energy upgrade ideas that may be foreign to them, and allowing auditors to become accustomed to analyzing a house to reach much higher levels of performance.

Contractor Training Regional Energy Alliances will work with Advanced Energy and local educators in target communities to deliver in-depth contractor training designed to assist BPI certified contractors to become successful home energy remodeling contractors. Advanced Energy will utilize a train the trainer model to provide instruction for contractor development by regional trainers based on DOE Workforce Guidelines.

Recruitment It will be the duty of the Regional Energy Alliance (REA) to recruit contractors, auditors, and real estate professionals for trainings.

1.3 DOCUMENT SPECIFIC DEFINITIONS

For purposes of this document, the party to whom the RFP is addressed (as set forth on the cover page to this RFP) shall be referred to as "Supplier" and any materials submitted in response to the RFP shall be referred to as Supplier's "Proposal." Any reference to "Solution" shall mean the total combination of products and services offered by Supplier to achieve SEEA's defined resource and project requirements set forth in the RFP. Any reference to "Project" shall mean the underlying SEEA business initiative that encompasses, in whole or in part, the Solution sought by this RFP.

1.4 ISSUING ORGANIZATION:

This RFP is issued by the Southeast Energy Efficiency Alliance. Please refer all inquiries to:

Scott Slusher
Senior Technical Projects Associate
Southeast Energy Efficiency Alliance

Email Only
Scott@seealliance.org

1.5 REJECTION OF RESPONSES:

SEEA reserves the right to reject any and all applications received from respondents as a result of this request.

1.6 INCURRING COSTS:

SEEA is not liable for any cost or expenses incurred by the Supplier or any other person or entity in the preparation of their applications or proposals (including, without limitation, for attendance at any conferences or meetings related to this RFP).

1.7 DISCLOSURE OF RFP RESPONSE CONTENTS:

Supplier's Proposals are not confidential. All material submitted becomes the property of SEEA. SEEA has the right to use any or all concepts presented in any application. Approval or disapproval of an application does not affect this right.

1.8 ADDENDA TO THE RFP:

If it becomes necessary to revise any part of this RFP, addenda will be provided to all respondents who received the original RFP.

1.9 DEBRIEFING CONFERENCE:

Suppliers whose Proposals are not approved will be notified and at SEEA's election in its sole discretion will be given an opportunity to be debriefed. The purpose of the debriefing is not to compare Proposals, but to provide information that may assist in preparing any future RFP responses. SEEA will schedule the date, time, and location of any and all debriefing conferences.

1.10 NEWS RELEASES:

Supplier will not issue any news releases or other public statements pertaining to this RFP without SEEA's prior written approval.

1.11 RESPONSE DATE:

In order to be considered for initial review and approval, Proposals must arrive by 2:00 p.m. on November 2, 2011 and at the location specified in this RFP. Proposals received after the deadline time and date for this initial solicitation will not be considered.

1.12 PROPOSALS:

To be considered, Supplier's Proposal must be complete and in the format provided in the Appendices to this RFP. In addition, SEEA will accept no more than a 20 page narrative, 11 point font, excluding attachments, responding to the items contained in the RFP. Applicants will not be given an opportunity to change any part of a Proposal after submission. Proposals submitted electronically must be received by SEEA at scott@seealliance.org.

1.13 RESTRICTION OF CONTACT:

From the issue date of this RFP until a determination is made regarding the qualification of respondents, all contacts with SEEA personnel concerning this RFP must be made through Scott Slusher or the designated SEEA Program Director.

Organizations interested in being considered as the qualified provider are requested to provide information on their organization's history, partners, proposed organizational structure personnel, marketing plan, fees, and previous experience in energy services delivery, financial condition and other information as listed and detailed below.

2 SUPPLIER GUIDELINES AND ACTIVITIES

2.1 RFP SCHEDULE AND SELECTION PROCESS

The following schedule and due dates may be modified at the discretion of SEEA at any time. Supplier will be notified of changes to this schedule. All times are stated in Eastern Daylight Savings Time.

Date	Description
9/30/2011	RFP Issued to Suppliers
10/12/2011 at 2pm	RFP Questions due to SEEA
10/20/2011 at 2pm	Bidders' Conference (Entire RFP Group conference call) Call in Number: 1-866-244-8528 Code- 392418#
11/02//2011 at 2pm	RFP Response Due Date
11/11/2011	Supplier selection communicated
11/30/2011	Contract signed

SEEA shall be entitled to modify any aspect of this RFP (including, without limitation, the requirements set forth herein for Proposals and the schedule for the Project set forth above) from time to time. Proposals not in compliance with this RFP as amended by SEEA will not be considered. Proposals submitted pursuant to this RFP shall be deemed offers by the submitting Supplier, and will be irrevocable by the submitting Supplier for one hundred twenty (120) days following the RFP Response Due Date. Nothing in this RFP shall require SEEA to accept any Proposal. Except as otherwise agreed by the parties in a signed definitive agreement pursuant to Supplier's Proposal, if such Proposal is selected by SEEA in its sole discretion, the SEEA shall be entitled to modify or discontinue the Project at any time.

3 SPECIFICATIONS AND REQUIREMENTS

3.1 SCOPE

In order for Virginia to effectively meet the SEP grant requirements for retrofits completed, the project needs a streamlined web-based engagement tool (WET), which converts interested customers into REA program participants. Specifically, we look for this online energy assessment tool to:

- Build demand for existing home energy upgrades through engaging homeowners on their energy use
- Generate energy-efficiency retrofit "leads" for Regional Energy Alliances and strategic partners
- Enable program contractors to pre-qualify customers
- Enroll customers into the REA's programs
- Segment customers for targeted marketing
- Capture and store utility data from utility companies once permission given from user (e.g., gas, electric).

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- Work with home scoring tools used by the REAs, such as Earth Advantage Institute’s Energy Performance Scorecard (EPS) or the Department of Energy’s Home Energy Score

3.2 SPECIFICATIONS

1. **Website:** Provide a simple and aesthetically pleasing entry point where homeowners can access basic program information from REAs across the states such as program qualifications and rebates, participating contractors and other information the REAs want to provide.
2. **Online Energy Analysis Tool:** An online energy analysis tool that provides a user with an estimate of their potential for energy savings, recommendations and a social comparison. This tool should be accurate, easy to use, and readily implemented. Some kind of third party validation of its accuracy and ease of use is desired (e.g., stats which show completion rate, email capture rate, enrollment conversion).
3. **Engagement Points:** The overall experience should include ways to capture user’s email address for further information. Additionally it should be possible to collect user’s full contact information (Name, Address, Phone, Email, etc.) as part of an enrollment or lead form. The ultimate goal for this website and online energy analysis is to funnel customers to the REAs via a customized lead or enrollment form, which once sent will redirect them to the REA’s website.
4. **Online Utility Data Collection:** A way to capture online utility data for customer monthly energy usage.

3.2.1 THE PRIMARY GOALS OF THIS PORTAL ARE:

1. Spur and channel participation in regional programs operating within the state.
2. Provide a tool program administrators and their contractors use to pre-qualify and engage homeowners.
3. Provide an informative resource for the Virginia’s SEP program and basic REA program information.
4. Work with home scoring tools such as Earth Advantage Institute’s Energy Performance Scorecard (EPS) or DOE’s Home Energy Score.
5. Leverage existing regional, local, and statewide resources to the greatest extent possible, prompting job retention and creation within the residential contractor and energy auditor industries

3.3 PRIMARY REQUIREMENTS SUMMARY

3.3.1 WEBSITE

The website should be simple and user friendly and include:

- A way for program administrators to update content in a self-service manner.
- Website content regarding the benefits of home performance (please provide details of organization’s expertise in developing effective content). REA’s will ultimately be responsible for their respective content, program descriptions, and offerings available on each site.
- Ability to support up to 4 programs, each with their own unique program logo, branding and local information, such as:
 - Participating contractors
 - Rebates
 - Financing

3.3.2 ONLINE ENERGY ANALYSIS TOOL

The online analysis tool should offer a user friendly way for homeowners to input information about their home and receive back an estimate of their potential for energy savings, customized recommendations, a comparison of how their home compares to similar homes and be customizable with local program information. The proposed Online Energy Analysis Tool should have:

- A third party verified high rate of user engagement as measured by the rate at which homeowners complete the tool without using pre-filled form data
- A high email conversion rate, that is the rate at which users give their email address for further contact
- At least one third party assessment of the accuracy of the engagement tool

- Provide data export for integration with program software such as CRM systems or email programs
- A proven ability to seamlessly integrate and customize to the look and feel of the program website with respect to the lead or enrollment form

3.3.3 ENGAGEMENT POINTS

The overall experience should include a lead form or enrollment form (depends on individual REA's program specifics) which enables the program to add custom fields to capture a user's contact information, issues with their home, interest in the program, etc.

- This form should be customizable in look and feel for the program to which it is attached
- The information captured in this lead or enrollment form should be secured with access limited to a set of authorized REA program representatives.
- This information should also be exportable in CSV format to interact with a variety of systems.

3.3.4 ONLINE UTILITY DATA COLLECTION

Enable customers or program administrators to capture customer energy usage. Captured monthly utility data should include the following options for gas, electric and propane usage data points:

- Kilo-Watt Hours
- BTU's
- Therms
- Cubic Feet
- Gallons

Members of SEEA staff, State Energy Offices and Regional Energy Alliances must be trained on all aspects of using the WET. Please describe how you would work with SEEA to train contractors and staff on the WET. If there will be ongoing training for new users or applications, please cite costs.

3.4 OPTIONAL FUNCTIONALITY REQUESTS

Although the following are not primary requirements for this RFP, bidders who incorporate optional functionality requests into their engagement tool proposals, are desirable. The optional functionality requests are:

- Linkage to utilities, rebate programs, other resource information.
- Social media integration which enables customers to share site information or their report with friends.
- Coupon codes for customers who use the online assessment to track them back to contractor or other stakeholder partner referrals
- Ability to build email marketing lists segmented by potential energy savings and home profile
- Set user defined goals for energy or money savings

3.5 SERVICE REQUIREMENTS

It is anticipated that during and after the beta phase implementation of the online homeowner engagement tool and dashboard, the Supplier will be available to answer questions and correct issues promptly until all functionalities operate independently and without issue. Costs for upgrades or additions to the system should be described.

3.6 INTELLECTUAL PROPERTY OWNERSHIP

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Proposals should be based on the understanding that, as between SEEA and the Supplier, each will retain ownership of its “background intellectual property” (*i.e.*, the intellectual property that it owns on the effective date of the definitive agreement), and SEEA will own all intellectual property created by Supplier in connection with the Project. Proposals may include alternative approaches to intellectual property ownership with respect to specific Solution components; any such alternatives should clearly describe the impact on any other term of Supplier’s Proposal if SEEA should select such alternative. “Intellectual property”, as used in this section, should be read broadly to include, without limitation, copyrights, patent rights, trademarks or any other proprietary rights to any intangibles and the samples, copies and other materialized forms or representations of such intangibles.

4 SUPPLIER RESPONSE

Proposals should include the sections outlined below; the numbering should be identical to the sections outlined below. Except where specifically requested, the Proposal shall be contained within a single document no more than 20 pages, 11 point font, excluding attachments.

4.1 CONTACT INFORMATION

Please complete the following table:

Responding Company Information	
Responding company:	
Primary Contact name:	
Address:	
ZIP code:	
City:	
Country:	
Phone number:	
Fax number:	
Email:	

4.2 SOLUTION DESIGN

4.2.1 COMPETITIVE LANDSCAPE

Please describe the benefits you believe are unique to your firm. Why should SEEA choose your firm over another? Please be very specific.

What do you believe are your firm’s strengths? What do you believe are the challenges you face?

Whom do you see as your primary competitors? What do you see as their greatest strengths and challenges?

4.2.2 PROJECT MANAGEMENT

Describe your approach to project management including roles proposed in the Solution model.

Describe what project management role(s) SEEA plays in the overall Solution model and how SEEA’s role(s) will interact with the Supplier roles.

4.2.3 QUALITY AND TESTING

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Describe your proposed quality assurance (“QA”) processes, including tools used and how you will measure quality and best practices.

Describe your approach, process, and procedures for software testing and user acceptance testing.

4.2.4 ROLES AND RESPONSIBILITIES MATRIX

Based on your understanding of the Project requirements define SEEA and the Supplier responsibilities, tasks, communication channels, reporting structures, and work-transition protocols. Provide a SEEA and Supplier Roles and Responsibilities Matrix that outlines ownership for all of the major activities including direct operational activities, project management, and governance.

4.2.5 DEVELOPMENT APPROACH, METHODOLOGY AND TOOLS

Please provide a detailed overview of your project approach and methodology. Please include specifics on phases, deliverables, resources and duration. Indicate any specific templates, aids, or other project tools that you would utilize. Provide an implementation plan with supporting organization chart and roles and responsibilities.

Describe your company’s proprietary methodology, tools, and any accelerators that will help ensure success of the Project.

Describe your proposed implementation plans, including project phases, milestones, major deliverables and timelines.

Describe the project management tools that will be used including scheduling, cost control and budget management, resource allocation, collaboration software, communication, quality management and documentation.

4.2.6 UNIQUE APPROACH

Please describe what aspects to the approach described above are unique to your firm.

4.2.7 TRAINING

Describe how training and knowledge transfer will be accomplished for the Project. Indicate how many days of training you anticipate, availability of training locations (including availability of on-site training at SEEA’s premises), and prices for training sessions (e.g., per session, per person, or another basis).

4.2.8 APPROACH TO DESIGN AND ROADMAP

How would you approach technology design and roadmap development?

4.2.9 CONNECTIVITY AND SECURITY

Describe how you propose to enable connectivity and manage data security risk.

Describe how the model proposed utilizes internal and external network environments. Detail the hardware and software requirements and who will be responsible for their cost. Specifically include the link to utilities in this analysis.

Describe your network management, monitoring, and alerting capabilities and approach to ensure security of assets and networks. Describe use of firewalls and identify any security tools/software implemented.

Provide details regarding your most recent security assessment of your environment performed by a recognized third party.

Describe your approach to information security including but not limited to incident identification, escalation, client involvement, breach stoppage, remediation, and reporting.

4.2.10 DISASTER RECOVERY

Describe disaster recovery and business continuity systems and procedures in place that will ensure uninterrupted project delivery.

Describe how customer notifications are handled should a disaster be declared.

4.2.11 KEY PERFORMANCE INDICATORS (“KPIs”)

Identify all KPIs you think relevant for this Project. Based on the KPIs outlined, confirm your ability to meet these key performance indicators.

Please describe the process and tools you will use for measuring, monitoring, tracking and reporting KPIs, including specific reports and/or formats.

Demonstrate how you will accept risk and liability in service performance.

4.3 PROJECT ORGANIZATION, RESOURCES, AND STAFFING

4.3.1 PROPOSED ORGANIZATION AND STAFFING

Provide a proposed resource plan. The model should include: The proposed organization chart including both SEEA and Supplier roles and a listing of roles and responsibilities with details of relevant experience. A completed proposed staffing model Completion of Appendix B, Personnel Information (mandatory)

4.3.2 STAFFING FLEXIBILITY

Describe your company’s ability to quickly ramp-up additional resources in response to peak demands or incremental project work.

Describe your subcontracting approach and model for partnering with niche suppliers on this project.

4.3.3 PROJECT RECRUITMENT AND STAFFING

Describe the process you follow to recruit staff for your company, particularly the process to hire any new staff required for this request. Please detail the use of any subcontractors.

4.4 RISKS

Describe the risks and challenges you envision for this particular Project. Describe approaches used in mitigating risks and for risk management in general.

Explain how you will mitigate the risk of having a third party supplier or other providers providing services.

Describe the methodology used to measure risk, circumstances under which it is employed and example artifacts/documentation sufficient to understand the model.

4.5 PRICING

Use attached Appendix 1 to provide the pricing for your products and services. The RFP response is required to include detailed pricing. The Supplier is invited to propose an alternative pricing model thought to offer advantages to the SEOs or REAs. If this alternative model is provided, please describe calculation methodology as well as the benefits this model affords SEEA or the stakeholders it represents.

4.5.1 SPECIFIC ELEMENTS OF PRICING

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Describe and explain the pricing terms for your products and services, including any maintenance fees, support fees, training fees and any other miscellaneous expenses. For professional services fees, include your current rate card.

4.5.2 FIRM PRICING

The prices quoted shall be valid and binding offers by the submitting Supplier and not subject to change for a period of one hundred twenty (120) days following the RFP Response Due Date. Each proposal shall provide the most detailed price breakdown possible vis-à-vis the nature of the Project, your proposed solution for the Project, and your plan for completion of the Project.

4.5.3 ALL-INCLUSIVE PRICING

Proposal pricing shall be inclusive of all charges relating to the Project, such as supplies, postage, shipping charges, charges to equipment, utilities, telecommunications, environment and space charges, updates, tools, taxes, travel and out-of-pocket expenses.

4.5.4 DELIVERY AND PAYMENT SCHEDULES

Provide a schedule of estimated completion dates for specific tasks and milestones for the Project and a breakdown of product and/or services costs.

4.6 VALUE-ADDS / ADDITIONAL INCENTIVES

If applicable, provide Value-Adds / Additional Incentives that offer significant savings or value beyond the solution proposed in direct response to the requirements/limitations of this RFP.

EXAMPLES: Project Manager at no cost
 Online Knowledgebase provided for customers
 Support for sharing program information between REAs
 Program consulting on web-based engagement tool integration to other CRM or programmatic software

4.7 ALTERNATIVE RESPONSE

If applicable, provide alternate solution models that offer significant cost savings or process improvements beyond the solution proposed in direct response to the requirements/limitations of this RFP. Elaborate how any particular levers (KPIs, outlined requirements, etc.) may be modified in support of this alternate solution.

4.8 ASSUMPTIONS

Provide all assumptions that are related to the Proposal not already included as a pricing assumption in the pricing model.

4.9 COMPANY OVERVIEW

Please provide the following information regarding your company:

Company structure/organizational model financial overview with focus on proof of financial stability relevant certification

Provide any relevant information on how your company's structure, style, values, or approach which will support this Project for SEEA, the SEOs, and the REAs.

4.10 CREDENTIALS

4.10.1 OVERALL EXPERIENCE AND REFERENCES

Describe your company's current or previous experiences (no more than 3) in implementing energy efficiency information technology projects which have direct similarities to this request. Please provide a description of the project, a list of services provided and reference contact information including company name, contact name, title, and phone number. If SEEA wants to discuss these projects with the references, SEEA will ask Supplier to set up the meeting.

Explain how previous organization or staff experience will benefit the implementation of this Project.

4.10.2 BANKRUPTCY, PENDING JUDGMENTS, LAWSUITS

Describe your company's current legal and financial situation.

- Has your company ever filed for bankruptcy?
 - If you answered Yes to the previous question, please explain when and current status.
- Are there any claims, judgments, arbitrations, investigations or lawsuits pending against your company?
 - If you answered YES to the previous question, please explain by describing those that are material (all claims for intellectual property infringement and customer claims and claims in excess of \$200,000 are deemed material), and generally identify those claims that are non-material.
- Provide your Dun & Bradstreet Current Financial Strength Rating. Example 5A-1 to HH-4.

4.10.3 CERTIFICATE OF INSURANCE

You must provide a Certificate or Certificates of Insurance that describes the insurance coverage's you presently carry (e.g., General Liability, Automobile Liability, Worker's Compensation, and Professional Liability), including the Limits of Insurance afforded under each insurance policy.

5 HOW TO RESPOND TO THE RFP

5.1 PROPOSAL EVALUATION

All proposals received by the due date and meeting the requirements established in this RFP will be reviewed and ranked by a Selection Committee consisting of SEEA staff and other selected representatives from the State of Virginia, and, others as decided by SEEA and Virginia State Energy Office.

The executed contract ("Contract"), if awarded, will be awarded to the selected respondent(s) proposal(s) that is deemed most advantageous to SEEA and the SEO it represents. SEEA reserves the right to accept one or more proposals or reject any or all proposals received in response to this RFP, and to waive informalities and irregularities in the proposals that are received. SEEA may award the Contract without discussion with respondents after proposals are received and evaluated. SEEA may negotiate the terms and conditions with one or more respondents. Respondents may be asked to provide additional detail or make oral presentations of their proposals. The top ranked respondent will be notified in writing as soon as possible after the acceptance of its proposal.

5.2 QUESTIONS ABOUT THIS RFP AND FOLLOW-UP

A single point of contact has been established for all pre-proposal questions and follow-up relating to this RFP. You should direct all questions and your final response submission to Scott Slusher.

5.3 DUE DATE

One (1) printed and one (1) electronic copy of your proposal must be returned by 2:00 PM EDT) on November 2, 2011. The hard copy may arrive up to twenty-four (24) hours after the electronic copy has been received. All correspondence should be addressed to:

Scott Slusher
Senior Technical Projects Associate
Southeast Energy Efficiency Alliance

ELECTRONIC SUBMISSION
Scott@seealliance.org

HARDCOPY SUBMISSION
50 Hurt Plaza SE, Suite 1250
Atlanta, GA 30303
931-675-0313

PRICING CHART

RATE STRUCTURE:

Detail available options

HARDWARE NEEDS:

Detail equipment needs and prices

UPGRADES:

Pricing on upgrades. SEEA expects that bug fixes, patches, updates and upgrades to the Solution software, including any upgrades that add functionality required of the Solution under this RFP (but not including new versions of the software that add new functionality requested by SEEA) will be included in the overall bid price for the Solution. To the extent that this expectation is incorrect, describe in detail the costs that will apply to such bug fixes, patches, updates and upgrades.

MAINTENANCE FEES:

Costs and available options

TRAINING COSTS:

SUPPORT:

Detail various levels and prices

CONSULTANTS:

Hourly rates

In lieu of resumes, describe the qualifications for each of the firm's key personnel who will be involved in this project by completing the form labeled **Attachment B**.

PERSONNEL INFORMATION

Using the format provided below, briefly describe the relevant experience, qualifications and educational background for only those primary team members (no more than 10 individuals) who will directly be working on local energy services projects. Identify the person responsible for contract negotiations and the firm's legal counsel for energy services. Do not include individual resumes.

Name of Project Team Member:	
Current Job Title:	
Job responsibilities:	
Number of years with organization:	
Primary Office Location:	
Educational Background: List all academic degrees, certifications, professional affiliations, relevant publications and technical training.	
List all energy services projects this individual has been involved with during past 5 years. Include project location, type of facilities, year implemented and dollar value of installed project costs.	
Describe the specific role and responsibilities this individual had for each listed project.	
Provide a detailed description of the role and responsibilities this individual will have for the duration of this project.	
Describe any other relevant technical experience.	

SUPPLIER PROPOSAL EVALUATION RUBRIC

Award shall be scored on the following criteria based on a weighted scale of 0-3 using the below guidance:

Does not meet specifications or requirements outlined in RFP – 0

Vague or missing primary requirements – 1

Inclusive of all primary requirements – 2

Exceeds primary requirements to include optional functionality requests – 3 (explain how)

Functionality	Grade	Weight
Website: A simple and aesthetically pleasing entry point where homeowners can access participating program information such as program qualifications and rebates, participating contractors and other information. Website leverages existing regional, local, and statewide resources.		10%
Online Energy Analysis Tool: An accurate and engaging online energy analysis tool that provides a user with an estimate of their potential for energy savings, recommendations and a social comparison. Third party validation of the tool's accuracy on projected savings. Third party verification that the tool works terms of homeowners using it (i.e., completion of online assessment, email capture, lead generation). Individual customer data from online engagement tool should be accessible to REAs. Ability to work with home energy scoring tools such as Earth Advantage Institute's Energy Performance Scorecard (EPS) or DOE's Home Energy Score.		40%
Engagement Points: The overall experience should include ways to capture user's email addresses for further information. Additionally it should be possible to capture user's full contact information on a REA customized lead or enrollment form. Data from these forms should be exportable.		10%
Online Utility Data Collection: An ability to collect utility data to capture customer monthly energy usage.		10%
Incorporation of optional functionality needs.		10%
Professionalism of company – project management experience, caliber of developers on staff, professional qualifications & experience of the organization's staff. Recent successful execution of similar projects and experience with energy services or energy efficiency programs.		10%
Innovativeness, reasonableness of pricing & comprehensiveness of written proposal. Uniqueness of product – does it bring value added opportunities to the program for revenue generation.		10%
Reviewer Name:		

ORGANIZATIONAL INFORMATION

Provide a profile of the organization by supplying the information requested in **Attachment D**. All questions must be addressed. If not applicable, enter "N/A."

GENERAL FIRM INFORMATION

Firm Name: _____

Mailing Address: _____

Physical Address: _____

Provide contact information of two principal contact persons:

1) _____
 Name Title Phone

 Fax Email Address

2) _____
 Name Title Phone

 Fax Email Address

Date Prepared: _____

Federal Employer Identification Number: _____

Year Organization Established: _____

Five-year summary of contract/grant values for energy related services:

2011__: \$_____ (to date)

2010__: \$_____

2009__: \$_____

2008__: \$_____

2007__: \$_____

Estimate of total value for all energy-related contracts or grants that are currently in force:
\$_____ (total value) as of _____ (date).

Organizational Background

Years Under Present Name. How many years has your organization operated under its present business name?
_____ Years

Former Names. Indicate all other names by which your organization has been known and the length of time known by each name.

Name: _____ Years: _____

Name: _____ Years: _____

Years in Energy Business. How many years has your firm been providing energy-efficiency related business?
_____ years. How many years has your firm offered energy services? _____ years.

Financial Information

Financial Statement. Attach your firm's most recent financial statement or annual report for each of the last two years.

Statement of Financial Conditions. Attach the most recent annual Statements of Financial Conditions, including balance sheet, income statement and statement of cash flows, dated within the past twelve (12) months. Provide the name, address, and the telephone number of firm(s) that prepared the Financial Statements:

Name: _____

Address: _____

Phone: (____) _____

Accounting Firm Information. If these financial documents were not produced in-house, indicate the name, address and phone number of the firm(s) that prepared these financial statements.

Banking References. List contact person with phone number, address and name of

bank(s) used by your firm.

Audits. Please describe whether your company has ever been the subject of audit findings for any state or local government client. Provide details regarding resolution.

10. Authorization

Dated at _____ this day

of _____, 20____.

Name of Organization:

By _____

Title _____

OPTIONAL SUPPLIER INFORMATION

At your discretion, you may attach to this Appendix E additional information and documentation (e.g., work flow charts, schematics, etc.) that might assist our Supplier qualification review process.

	Item #	Heading Name
Attachment for #	_____	_____
Attachment for #	_____	_____
Attachment for #	_____	_____
Attachment for #	_____	_____
Attachment for #	_____	_____